This QuickStart Guide highlights the updated Conflict of Interest related procedures and new functions created by the implementation of the Kuali Coeus Conflict of Interest (KC COI).

**All Investigators:** Login to the UCI Zot!Portal, [https://portal.uci.edu](https://portal.uci.edu), with your UCnetID.

**All Investigators: Complete your Annual Disclosure**

In the Kuali Coeus Conflict of Interest section of the Research tab, click “Create/Update Annual Disclosure.”

**Question 1- Only select “Yes” to report the acquisition or discovery of a new significant financial interest (excluding travel).**

A "new SFI" includes:
- A different type of SFI (e.g., royalty payment versus income) from a previously disclosed source/entity; and
- A significant financial interest from a new source/entity (e.g., company A versus company B).

**Answer both questions of the Annual Disclosure.**

Questions about...
- **KC COI?** Contact the eRA Support Team, [era@research.uci.edu](mailto:era@research.uci.edu)
- **Conflict of Interest?** Contact the COI Team, [coioc@research.uci.edu](mailto:coioc@research.uci.edu)
Questions about…

• KC COI? Contact the eRA Support Team, era@research.uci.edu
• Conflict of Interest? Contact the COI Team, coioc@research.uci.edu

Click “Submit” at the bottom of the page.

After you have successfully completed your Annual Disclosure, you will receive a confirmation email and be redirected to your Master Disclosure.

Note: PHS Investigators are required to submit their travel disclosures by clicking the “Create New PHS Travel Disclosure” link in their Annual Disclosure confirmation email.

All Investigators: Report a “New Significant Financial Interest” excluding travel

If you acquired or discovered a new significant financial interest (excluding travel), repeat the above steps except check “Yes” for Question 1 in the Annual Disclosure.

Your response to Annual Disclosure Question 2 should be “Yes” since you are reporting a new SFI excluding travel.

The Conflict of Interest team will contact you if additional disclosure forms are required through email.

Questions about…

• KC COI? Contact the eRA Support Team, era@research.uci.edu
• Conflict of Interest? Contact the COI Team, coioc@research.uci.edu
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<tr>
<th>PHS Investigators: Complete a PHS Travel Disclosure for each sponsored or reimbursed trip</th>
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<td>In the Conflict of Interest section of the Research tab, click “Create New PHS Travel Disclosure.”</td>
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NSF Investigators with significant financial interests: Complete your NSF Disclosure

- Current Annual Disclosure required prior to completing NSF Disclosure. If your Annual Disclosure is incomplete or has expired, you will receive an email to complete the Annual Disclosure.
- NSF Investigators without any significant financial interests (responded “No” to the second question of their Annual Disclosure) do not need to complete the NSF Disclosure.

If you disclosed positively in the Annual Disclosure (you responded “Yes” to the second question), then you will be notified to complete your NSF Disclosure when you are added to a NSF compliant proposal as an Investigator through email.

Alternatively, you can go to the Kuali Coeus Conflict of Interest section of the Research tab in Zot!Portal and click “NSF Disclosures to Complete” to find the link to your NSF Disclosure.

Find the proposal and click “Disclose.”

Questions about...

- **KC COI?** Contact the eRA Support Team, [era@research.uci.edu](mailto:era@research.uci.edu)
- **Conflict of Interest?** Contact the COI Team, [coioc@research.uci.edu](mailto:coioc@research.uci.edu)
Answer the one question and click “submit.”

After you have successfully completed your NSF Disclosure, you will be redirected to your Master Disclosure.

All Investigators: Other New Functions

To see a record of your disclosures, go to the Conflict of Interest section of the Zot!Portal Research tab, click “Master Disclosure.”

KC COI Email Tips

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<th>KC COI Email Notification</th>
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<tbody>
<tr>
<td>Action Item/Action Required</td>
<td>Respond as soon as possible to avoid delays in processing your project(s)</td>
</tr>
<tr>
<td>Reminder</td>
<td>Respond if applicable (ex. you need to update your financial interests or your Annual Disclosure is about to expire)</td>
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Questions about...

- KC COI? Contact the eRA Support Team, era@research.uci.edu
- Conflict of Interest? Contact the COI Team, coioc@research.uci.edu